

Delaware Taxpayer Portal – Delegating Authorized Users

The following pages outline the steps required for an Administrator to delegate Authorized User access to a tax account or Taxpayer Entity in the Portal.

We have developed the following definitions to assist in this process:

Administrator: Account Administrators will have the overall access for the Taxpayer Entity along with all accounts under that Taxpayer Entity. There can be multiple Administrators for each Taxpayer Entity. Administrators can add/remove/update authorized user(s) and grant access to their tax account(s). Please ensure that you are only linking to the entity as the Administrator if you are in an authorized position within your organization.

Authorized User (or Delegated User): An authorized user is delegated by the Administrator(s) to have access to a Taxpayer Entity and/or selected tax account(s). This role allows delegated users to perform specific functions such as filing returns, making payments, etc. without having the high-level access that the Administrator has. There is no limit on the number of authorized users available under a Taxpayer Entity, nor the combination of access to the Taxpayer Entity or tax account(s). Each authorized user is delegated access as deemed appropriate by their Administrator(s).

Registered User: A Registered User is anyone with a valid Portal User ID and Password.

Tax Account: Tax accounts are the accounts specific to the Taxpayer Entity. For example, an entity may have a Gross Receipts account, Withholding account, an Alcohol account, etc. Each account may have a unique operating name, mailing address, license, etc.

Taxpayer Entity: The Taxpayer Entity is the high-level view of the tax account(s). All tax accounts administered by the entity are linked to these identifiers and considered to be part of the Taxpayer Entity.

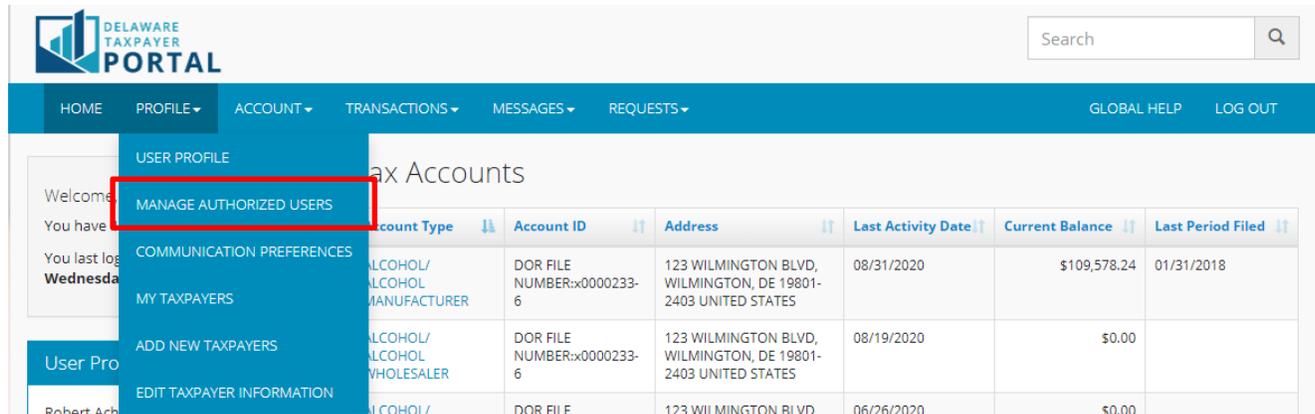
Delegating Authorized User Access

Prior to getting started, you must first have Administrator access to a Taxpayer Entity in order to delegate Authorized User access. Please review the Linking Entity/Administrator Guide for steps on completing this process or contact your Administrator to assist you in delegating an Authorized User.

The individual being set up as an Authorized User must have their own Registered User Portal account and the Administrator must know the User ID for the individual they are setting up as an Authorized User.

1 Log in to the Portal and Navigate to the Manage Authorized Users page

To begin, navigate to the “Profile” header and select “Manage Authorized Users” from the drop-down menu.

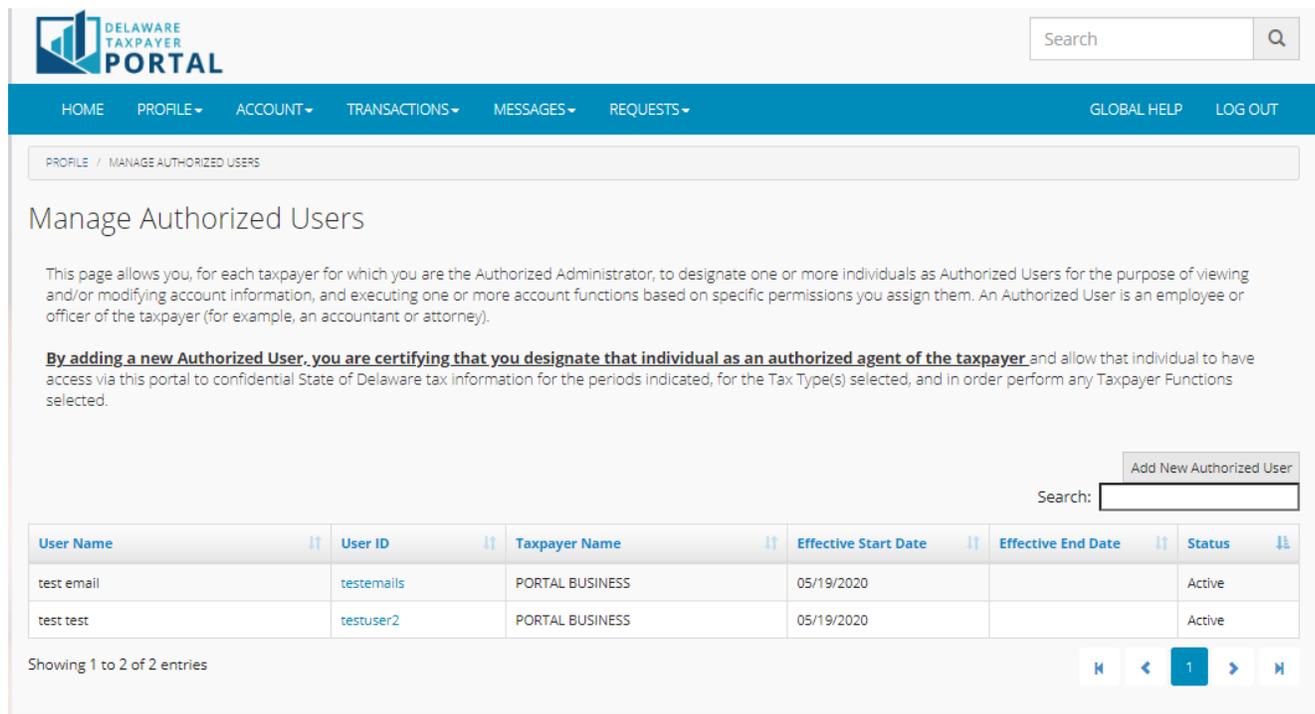


The screenshot shows the Delaware Taxpayer Portal interface. The 'PROFILE' dropdown menu is open, and 'MANAGE AUTHORIZED USERS' is highlighted with a red box. Below the menu, a table titled 'Tax Accounts' is visible, showing account details for 'ALCOHOL/ MANUFACTURER' and 'ALCOHOL/ WHOLESALER'.

Account Type	Account ID	Address	Last Activity Date	Current Balance	Last Period Filed
ALCOHOL/ MANUFACTURER	DOR FILE NUMBER:x0000233-6	123 WILMINGTON BLVD, WILMINGTON, DE 19801-2403 UNITED STATES	08/31/2020	\$109,578.24	01/31/2018
ALCOHOL/ WHOLESALER	DOR FILE NUMBER:x0000233-6	123 WILMINGTON BLVD, WILMINGTON, DE 19801-2403 UNITED STATES	08/19/2020	\$0.00	
ALCOHOL/	DOR FILE	123 WILMINGTON BLVD.	06/26/2020	\$0.00	

2 Navigate to the Add New Authorized User page

Review the instructions on the page, then click the “Add New Authorized User” button located above the search bar.



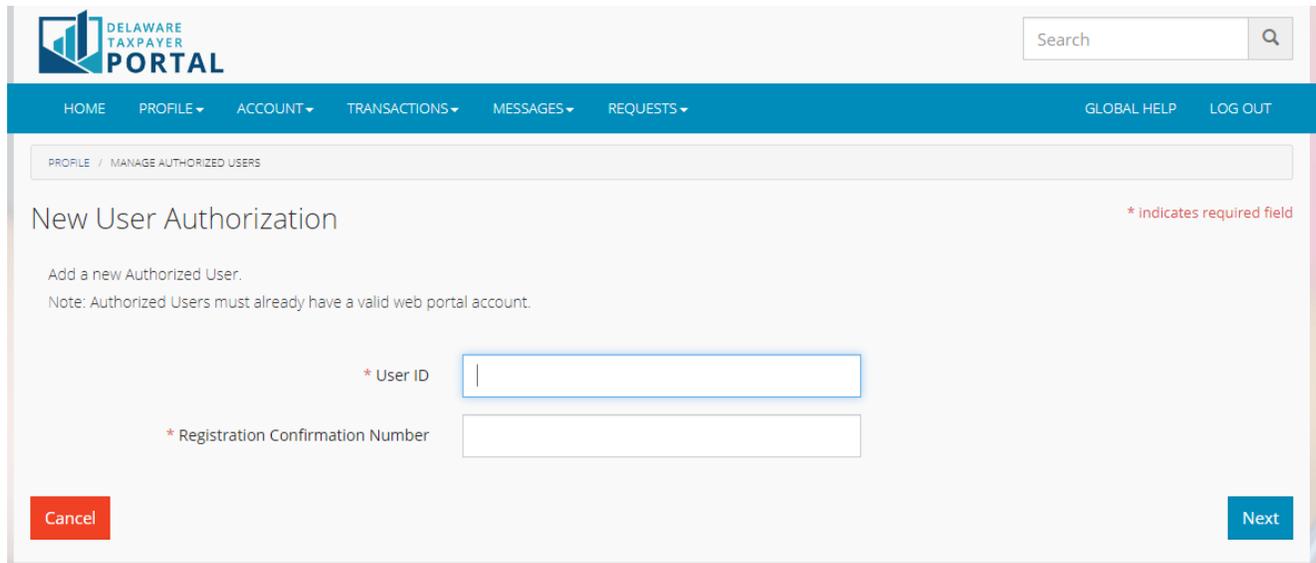
The screenshot shows the 'Manage Authorized Users' page. It includes a search bar, an 'Add New Authorized User' button, and a table listing existing authorized users. The table has columns for User Name, User ID, Taxpayer Name, Effective Start Date, Effective End Date, and Status.

User Name	User ID	Taxpayer Name	Effective Start Date	Effective End Date	Status
test email	testemails	PORTAL BUSINESS	05/19/2020		Active
test test	testuser2	PORTAL BUSINESS	05/19/2020		Active

Showing 1 to 2 of 2 entries

3 Enter User ID for new delegate

Enter the User ID and the Registration Confirmation Number of the individual you are giving Authorized User access to, then click “Next”.



4 Assign role(s) as required

First, confirm the correct User Information appears for the User you are giving access to.

Select the checkbox(es) on the left-hand side to select which Taxpayers you would like to give access to. Then, set a start date and end date (optional).

There is an option to manually give access, or to use a “template” for standard access levels. The Division of Revenue recommends authorizing access via a “template” as this is the simplest method.

5 Select Authorized Access

Choose a template to grant the appropriate access. The template options are as follows:

- 1 Full Access – authorizes users to complete all business functions for the entity's tax accounts registered with the Division. Business functions include but are not limited to filing tax returns, making payments, updating tax locations, making account updates, and submitting all service requests.
- 2 Payroll Access – authorizes business functions that include filing tax returns and making payments for withholding accounts, view withholding correspondence, and submitting select service requests.
- 3 CPA – authorizes business functions that include filing tax returns, making payments, view correspondence, view and renew licenses, and submitting select service requests.

You can also manually assign functions by Taxpayer Entity or by Tax Account(s). To do so, select Taxpayer Functions and/or Tax Account Authorizations. Select the appropriate functions you would like to give access to and select “OK” to return to the User Detail page.

6 Verify the Template

Verify the functions to be assigned and click “OK”.

If the wrong template was chosen, click “Cancel” to choose the correct one.

User Details
* indicates required field

View Profile History

User Information

First Name test
Last Name test
User ID testuser2
Last Logged On 05/07/2020 12:24 PM

Contact Information

Daytime Phone (717) 717-7117
Extension
Mobile Phone
Email Krishna.Indukuri@delaware.gov

Taxpayer Authorizations

Please select the checkboxes in the View column to assign the user read-only access to the selected taxpayers. Please select Taxpayer Functions and/or Tax Type Authorizations to assign the user additional access to the selected taxpayers.

View	Taxpayer Name	ID	*Start Date	End Date	Assignments
<input type="checkbox"/>	LICREN1	XX-XXX3829	MM/DD/YYYY	MM/DD/YYYY	Authorize Manually: <input type="button" value="Taxpayer Functions"/> <input type="button" value="Tax Type Authorizations"/> Or: <input type="button" value="Apply a Template"/>
<input checked="" type="checkbox"/>	PORTAL BUSINESS	XX-XXX3423	05/19/2020	MM/DD/YYYY	Authorize Manually: <input type="button" value="Taxpayer Functions"/> <input type="button" value="Tax Type Authorizations"/> Or: <input type="button" value="Full Access"/>

7 Save and Confirm the Delegation

To proceed, select the “Save” button. Review the authorized user, tax accounts, and functions. Select “Confirm” to complete the delegation.

8 Delegation Successful

You will receive a success message and will return to the Manage Authorized Users page with the newly Delegated user appearing in the list.

To add additional Authorized Users, repeat the steps above.

If you need to remove access from an Authorized User, simply revisit the User Details page, click on the User ID and enter the appropriate end date for the User’s access. Click “Save” to save your changes.